Institute for Alternative Futures

Primary Care in 2025

Eric Meade
Vice President & Senior Futurist
November 16, 2012

About that breakfast…

Food	Calories
Breakfast Burrito	420
Blueberry Muffin	380
Cheese Danish	260
Sliced Fruit	107
Orange Juice	112
TOTAL:	1279

Half of today's required calories.

Just sayin'.

Explore. Aspire. Create. Evolve.

Next time in Nashville…

- YMCA
- Renaissance Hotel
- Cream cheese danishes
- 0.7 miles
- Union Station Hotel

Explore. Aspire. Create. Evolve.

"I am my own medical home"

Transparent healthcare markets

"Owning the patient"

Primary care

40%: self-care with high-deductible catastrophic insurance

40%: integrated healthcare systems

10%: "concierge"

10% uninsured

Implications for Nursing

- Proliferation of health care roles
- Nursing roles in integrated health systems
  - Critical players on collaborative teams
  - Sophisticated users of health knowledge technology
  - Proficient in addressing social determinants of health
- Nursing roles in the Health & Wellness market
  - Small community nursing teams market their services directly to elderly, pediatric, and chronic care buyers, offering personalized care via home visits, telephone, and Internet
  - Health and wellness outcomes tracked and available online
  - Nurses serve as coaches on use of avatars, biomonitoring, etc.
  - Consultants on development of new tools and tech
- Expanded scope of practice in acute care settings as robotics and knowledge tech reshape care

Explore. Aspire. Create. Evolve.

---

*Comments or questions
on this scenario?*

Explore. Aspire. Create. Evolve.

Agenda

- "I Am My Own Medical Home"
- Scenario Project Background
- Three More Scenarios for Primary Care
- Nursing in 2025

Explore. Aspire. Create. Evolve.

Scenarios of Primary Care in 2025

SCENARIO PROJECT BACKGROUND

Explore. Aspire. Create. Evolve.

Scenarios: What and Why

- Alternative stories about the future
- They bound uncertainty and explore major pathways
- Used to:
  - Understand change
  - Identify emerging challenges and opportunities
  - Clarify assumptions
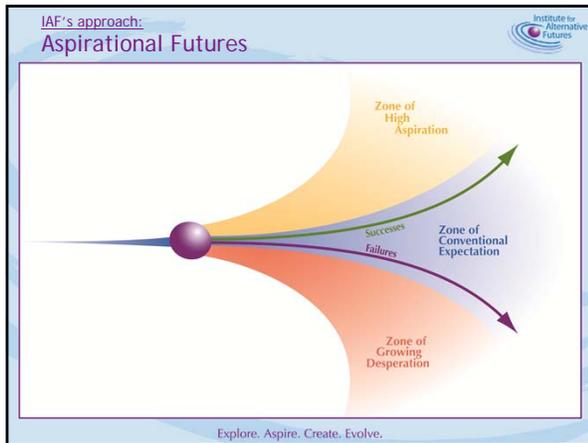 - Consider alternatives
  - Develop vision

Explore. Aspire. Create. Evolve.

Scenarios Should...

- Consider what's likely and what's preferable
- Aid in understanding and creating the future
- Lead to enhanced focus on vision, visionary success, and sensitivity to opportunities
- Be constructed around archetypes:
  - Expectable
  - Challenging
  - Visionary

Explore. Aspire. Create. Evolve.

IAF's approach: Aspirational Futures

Explore. Aspire. Create. Evolve.

Primary Care 2025

- Funded by the Kresge Foundation
- Produced forecasts of key forces shaping primary care, and the Primary Care 2025 scenarios
- Included interviews with 56 thought leaders and 10 focus groups
- Included a national workshop to develop recommendations to the nation
- Produced a scenario toolkit which your organizations can use for their own planning
- Project deliverables available at www.altfutures.org/primarycare2025

Explore. Aspire. Create. Evolve.

Scenarios of Primary Care in 2025

THREE MORE SCENARIOS

Explore. Aspire. Create. Evolve.

The Four Scenarios

Institute for Alternative Futures

1. Many Needs, Many Models
2. Lost Decade, Lost Health
3. Primary Care That Works for All
4. I Am My Own Medical Home (already presented)

Explore. Aspire. Create. Evolve.

Scenario #1: Many Needs, Many Models
Care Delivery

Institute for Alternative Futures

- Expansion of Patient-Centered Medical Home (PCMH)
- Increased emphasis on prevention
- Primary care provider (PCP) shortages - All PCMH team members practice at top of license

Explore. Aspire. Create. Evolve.

Scenario #1: Many Needs, Many Models
Advances in technology

Institute for Alternative Futures

- Electronic medical records widespread
- "Dr. Watson" expert support for providers
- More care delivered virtually
- Personalized vital signs
- Digital health agents, health games, and social networking

patientslikeme

Explore. Aspire. Create. Evolve.

Scenario #1: Many Needs, Many Models

Primary care

Institute for Alternative Futures

KAISER PERMANENTE®

40%: integrated systems with capitation and continuity

30%: semi-integrated with fee-for-service and pay-for-procedure

30%: Fee-for service
- Concierge care for the affluent
- CHCs for the lucky poor

Explore. Aspire. Create. Evolve.

Scenario #1: Many Needs, Many Models

Insurance market

Institute for Alternative Futures

- Many employers dropped coverage as Health Insurance Exchanges came online in mid-2010s
- HIX effectiveness varies from state to state
- Many rely on high-deductible catastrophic plans and pay out-of-pocket for most care
- Some states create single payer systems

Free Health Quotes
Compare Plans Instantly Side-by-Side
START
Save up to 47%!

Explore. Aspire. Create. Evolve.

Scenario #1: Many Needs, Many Models

Key Outcomes

Institute for Alternative Futures

- Nurse practitioner-managed primary care expands
- Significant disparities remain for access and quality
- Poor patients can rarely afford biomonitoring technologies that could help predict or preempt disease

Explore. Aspire. Create. Evolve.

Scenario #1: Many Needs, Many Models

Implications for Nursing

- Highly fragmented health care system with disparate nursing roles
- Slight expansion of nurse-managed health centers
- Greater integration of nurses into collaborative teams for primary, chronic, and episodic care
  - Access to sophisticated health knowledge technologies
  - Shift of workload for nurses and all toward upper end of license
  - Equitable access to leadership positions in integrated systems
- Less change in role in semi-integrated and FFS settings
- Persistent health challenges in low-income and minority populations

Explore. Aspire. Create. Evolve.

Comments or questions on this scenario?

Explore. Aspire. Create. Evolve.

Scenario #2: Lost Decade, Lost Health

Major Challenges

- Recurrent severe recessions
- 10% across-the-board cuts in federal spending in 2018 and 2022
- Shortage of PCPs – With reimbursement cuts, Boomer doctors retire if they can
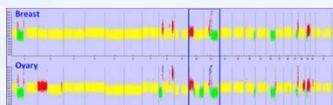
Explore. Aspire. Create. Evolve.

Slide 1

Scenario #2: Lost Decade, Lost Health

Primary care

Institute for Alternative Futures

KAISER PERMANENTE®

30%: integrated systems with capitation and continuity

20%: semi-integrated systems with mix of FFS and P4P

35%: FFS, often poor quality

15%: Concierge FFS with high tech

Explore. Aspire. Create. Evolve.

Slide 2

Scenario #2: Lost Decade, Lost Health

Virtual care expands, at a risk

Institute for Alternative Futures

- Many rely on "virtual doctors" and low-quality "digital health coaches"
- Drug vendors align with software developers to market to their patients
- 3,000 people die from interaction between prescription drug and herbal product recommended by EconoDoc

Explore. Aspire. Create. Evolve.

Slide 3

Scenario #2: Lost Decade, Lost Health

Implications for Nursing

Institute for Alternative Futures

- Nurses more frequently on the front lines of refusing care or helping patients choose among low-cost online options
- States expand nurses' scope of practice to match actual practice and to compensate for physician shortage
- Expansion of community health worker roles for some aspects of routine care compensates for nurse shortage
- Nurses drive innovation in safety net clinics to meet growing need for care

Explore. Aspire. Create. Evolve.

*Comments or questions
on this scenario?*

Explore. Aspire. Create. Evolve.

Scenario #3: Primary Care That Works for All
Major Developments

- PCMH expansion accelerates, with an expanding care team and incentives for quality
- Health Insurance Exchanges prove effective – many employers drop coverage
- Localized PCP shortages inhibit access

Explore. Aspire. Create. Evolve.

Scenario #3: Primary Care That Works for All
The Triple Aim

- Three components:
  - Enhancing patients' experience of care
  - Reducing per capital healthcare costs
  - Improving population health
- Policies address social and economic foundations of equitable health, and create healthy communities
- "If it's smart, we'll pay for it" – payment systems apply sophisticated statistical models to large health outcome data sets

Explore. Aspire. Create. Evolve.

Scenario #3: Primary Care That Works for All
Community-centered health home

- Evolves from PCMH
- Works with community partners to collect data on social, economic, and community conditions
- Aggregates health and safety data - systematically reviews health and safety trends
- Identifies priorities and strategies with community partners and coordinate activity
- Acts as community health advocates
- Mobilizes patient populations
- Strengthens partnerships with local health care organizations and establishes model organizational practices

Explore. Aspire. Create. Evolve.

Scenario #3: Primary Care That Works for All
Community health mapping

- Allows CCHHs to
  - Identify and mitigate health risks in their community
  - Intervene in local "hot spots" of ill health
  - Leverage "Big Data" – multiple data repositories from multiple sources

Explore. Aspire. Create. Evolve.

Scenario #3: Primary Care That Works for All
Primary care

KAISER PERMANENTE®

85%: integrated systems (e.g., CCHH)

10%: "concierge" fee-for-service

5% uninsured
Near-Universal Healthcare Coverage

Explore. Aspire. Create. Evolve.

Quick plugs...

Institute for Alternative Futures

Another project for the Kresge Foundation:
Community Health Centers Leveraging the Social Determinants of Health
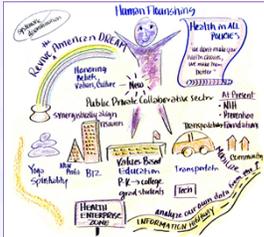Online at http://www.altfutures.org/leveragingSDH

Explore. Aspire. Create. Evolve.

Quick plugs...

Institute for Alternative Futures

A project for the Robert Wood Johnson Foundation:
Scenarios of Health and Health Care in 2032
Online at http://www.altfutures.org/health2032

Explore. Aspire. Create. Evolve.

Institute for Alternative Futures

*Comments or questions
on anything?*

Explore. Aspire. Create. Evolve.

Thank you!

Eric Meade
Vice President & Senior Futurist
Institute for Alternative Futures

703-684-5880
www.altfutures.org
emeade@altfutures.org

Explore. Aspire. Create. Evolve.